Hettick Accounting & Tax, LLC

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Dear valued tax client,

We have enclosed our 2017 Tax Organizer Packet to help you gather your tax information – instructions are on page 2. Please complete the following attached documents: Organizer, Questionnaire, and Agreement for Services. Once all of your tax information is gathered, you can upload it electronically via our ShareFile, mail it, or drop it off at your convenience. In addition, please provide us with copies of your last three years of tax returns.

We will not begin preparing your tax return until all information is made available to us; in order to provide the most efficient service possible, please wait and submit all of your tax documents and information at one time. If you would like to send us your information electronically, use our secure portal (ShareFile); you can find a link on the home page of our website. If you would like to meet and discuss your tax return information, an appointment will be necessary; please contact our office to schedule a time that works for you.

The filing deadline this year is April 17th, 2018. **To ensure your return is complete and on time, we must receive your tax information by March 23rd.** If we have not received your information by this date, you may be subject to additional fees and an extension may need to be filed.

If you have any questions or concerns, please do not hesitate to contact our office. Thank you for your trust and confidence in our services – we look forward to serving you this tax season!

Sincerely,

Hettick Accounting & Tax Team

Hettick Accounting & Tax, LLC

Tax Packet Instructions

Your tax packet includes the following items:

- **Agreement for Engagement of Income Tax Services* -** This agreement confirms that you are engaging our office to prepare your income tax return and confirms you have read and agree to the privacy policy. You must sign and date the agreement letter where indicated and return it with your tax information. If you are filing a joint return, both you and your spouse must sign the agreement.

- **Questionnaire* -** The questionnaire provides us with information needed to accurately prepare your tax return. You must complete this questionnaire and return it to our office with your tax information. If you are filing a joint return, both you and your spouse must sign the questionnaire.

- **Tax Organizer** – The tax organizer is designed to assist you in collecting and reporting information necessary for us to properly prepare your income tax return.

***Required Item** – we cannot begin the preparation of your tax return unless these items are returned to our office.*

Reminders:

1. Your tax return will not be filed until your return has been reviewed by you, your invoice has been paid in full, and your e-file authorization form has been signed.

2. We are no longer accepting any attachments to emails; if you would like to submit electronic documents you must use our secure Share-File system (you can find the link on the homepage of our website as well as in our email signature).

3. Please allow 10 Business days for us to prepare your return – we will contact you when your return is ready!

Contact Our Firm

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Hettick Accounting & Tax, LLC

Office Hours:

Regular Hours:

Monday – Thursday 9am to 5pm

& Fridays by appointment

Tax Season Hours:

Monday – Friday, 9am to 5pm

Saturdays & evenings by appointment

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